



WISCONSIN

DEPARTMENT OF WORKFORCE DEVELOPMENT

Division of Economic Support
Bureau of Welfare Initiatives

**TO: Economic Support Supervisors
Economic Support Lead Workers
Training Staff
FSET Administrative and Provider Agencies
Child Care Coordinators
W-2 Agencies**

BWSP OPERATIONS MEMO

No.: 99-91

**File: 1299
2720**

Date: 12/03/99

Non W-2 [X] W-2 [] CC []

PRIORITY: URGENT

**FROM: Stephen M. Dow
Program Implementation Team
Policy Analysis and Program Implementation Section**

SUBJECT: ANNUAL COLA-RELATED CHANGES

CROSS REFERENCE: Medical Assistance Handbook

EFFECTIVE DATE: 01/01/00

BACKGROUND

The cost-of-living adjustments (COLA), 2.4%, in the Social Security Administration's Old Age, Survivors and Disability Insurance (OASDI, or Title II) and **federal portion** of Supplemental Security Income (SSI) benefits effective 01-01-00 result in the following changes in the Medical Assistance income and asset levels, allowances and deductions.

There is no change in the level of the State Supplemental Payment to SSI recipients.

Most of these items are included in the CARES mass change done the weekend of 12/04/99.

The MA changes will be included in the **MA Handbook's** January, 2000 release.

CARES

Mass Change

Data updates are made based upon information received from the Social Security Administration (SSA) related to COLA increase to social security (i.e., disability, survivor, retirement) benefits and Supplemental Security Income (SSI) program benefits. The Medicare Part B premium amount is also updated based upon the yearly amount described in federal law. The benefit increase based upon the COLA will be 2.4% of the current benefit.

Updates of CARES Fields:

1. SSI Benefit
2. Social Security Benefit
3. 503 COLA Disregard
4. QMB/SLMB COLA Disregard
5. Medicare Part-B Premium amount.

CARES Screen

AFUI
AFUI
AFUI
AFUI
AFMD

For each person in a W-2, Child Care, MA or FS AG that is open or has been closed less than 30 days, CARES will update the SSA/SSI benefit amount on AFUI (the unearned income screen) for 01/01/00. We are using data supplied to us by the SSA to identify SSA/SSI recipients and new benefit amounts.

When the federal COLA file has **SSI** income but there is no corresponding SSI income in CARES, CARES will **not** be updated. "No corresponding information in CARES" means a case that has never had SSI or did have SSI but has it ended prior to January, 2000. The COLA information will be sent to the exception report and ED/BC will not be run.

When the federal COLA file has **SSA** income but there is no corresponding SSA income in CARES, CARES will be updated. "No corresponding information in CARES" means a case that has never had SSA or did have SSA but has it ended prior to January, 2000.

When there is information in the SSA COLA file and CARES has SSA and/or SSI income that is dated in the future (01/00 or later), CARES will not be updated and ED/BC will not be run. The information will be sent to the exception report.

When there is information in the SSA COLA file and CARES has SSA and/or SSI income that is ongoing and open-ended (12/99 or earlier with no end date), CARES will be updated and ED/BC will run. In addition, if either the SSA COLA or the CARES amount is zero, the information will be sent to the COLA information report.

Exception Cases:

1. Cases that have multiple types of SSA income in CARES will have the information sent to the exception report, regardless of the COLA information.
2. CARES has SSA greater than zero and SSA COLA has \$0; mass change will update CARES, run ED/BC and send the information to the exception report.
3. Cases that are overridden by an ESS will be updated and the information will be sent to an exception report, but ED/BC will not be run.
4. Cases that are deleted with the AE delete code will not be updated.

CARES Tables

An effective date of January 01, 2000 will be used for these reference table changes.

1. Changes in SSI related income and Shelter Limits are in table **TMEP**.
2. Changes in Community Waiver income limits and personal maintenance allowances as well as the Medicare Part B premium amount and the Spousal Impoverishment Maximum income allocation amount are **also** found in **TMEP**.
3. Changes in the SSA COLA percentage are found in **TSCA**.
4. The AFDC-related medically needy income limit is found in **TMST**.
5. The Spousal impoverishment asset limit is in **TASP**.

EOS REPORTS:

These reports will be generated from this mass change.

- | | |
|------|---|
| C303 | Assistance group affected by REF table Mass Change |
| C304 | Reference table Mass Change summary report |
| C305 | Reference table Mass Change summary report (State Summary) |

- C307 Exception summary report
- C308 A list of cases that for specific reasons were not updated or run through EDBC to recalculate their eligibility. This report lists the "exceptions".
- C309 A list of cases the ESS will want to review carefully, but which were still updated and eligibility re-determined. This report is called the "information only report".
- C310 Mass Change report for all the individuals updated

SSI-RELATED INCOME & ASSET CHANGES

Cross Reference: **MAH**, Appendix 25.9.3; Appendix 30.5.0.

Effective Date: 01-01-00.

CARES: These changes are part of the 12/04/99 CARES mass change.

ITEM	NEW AMOUNT	OLD AMOUNT
Categorically Needy Income		
Size 1	\$ 425.11 + Actual Shelter up to \$ 170.67	\$ 417.11 + Actual Shelter up to \$ 166.67
Size 2	\$ 644.72 + Actual Shelter up to \$ 256.33	\$ 632.72 + Actual Shelter up to \$ 250.33
Medically Needy Income		
Size 1	\$ 591.67	\$ 583.78
Size 2	No Change	\$ 591.67
Categorically Needy Assets		
Size 1	No Change	\$ 2,000.00
Size 2	No Change	\$ 3,000.00
Medically Needy Assets		
Size 1	No Change	\$ 2,000.00
Size 2	No Change	\$ 3,000.00

CATEGORICALLY NEEDY INSTITUTIONAL RESIDENT INCOME LIMIT

Cross Reference: **MAH**, Institutions Unit, Step #11.

Effective Date: 01-01-00

CARES: This change is part of the 12/04/99 CARES mass change.

ITEM	NEW AMOUNT	OLD AMOUNT
Categorically needy income limit for person in a medical institution.	\$ 1,536.00	\$ 1,500.00

SPOUSAL IMPOVERISHMENT INCOME ALLOCATION & ASSET SHARE

Cross Reference: **MAH**, Appendix 23.4.2 and 23.6.0.

Effective Date: 01-01-00

CARES: This change is part of the 12/04/99 CARES mass change.

ITEM	NEW AMOUNT	OLD AMOUNT
Community Spouse Asset Share (CSAS) maximum	\$ 84,120.00	\$ 81,960.00
Income allocation	\$ 2,103.00	\$ 2,049.00

Spousal Impoverishment Asset Table Effective 01/01/00

IF the total countable assets of the couple are:	THEN the CSAS* is:	MA Eligibility Limit
\$168,240 or more	\$84,120	\$86,120
Less than \$168,240, but greater than \$100,000	½ of the total countable assets of the couple	½ + \$2,000
\$100,000 or less	\$50,000	\$52,000

*CSAS is the "Community Spouse Asset Share".

Spousal Impoverishment Income Allocation & Allowance Table Effective 01/01/00

NOTE: All dollar amounts are monthly amounts

Community Spouse Allocation	The maximum allocation is the lesser of: \$2,103.00, or \$1,843.33 plus excess shelter allowance. "Excess shelter allowance" means shelter expenses above \$553. Shelter expenses are mortgage, rent, taxes, maintenance fees, and a utility allowance. Subtract \$553 from the community spouse's shelter costs. If there is a remainder, add the remainder to \$1,843.33.
Dependent Family Member Allocation	\$460.83 per dependent family member living with the community spouse.
Personal Needs Allowance	\$40 for institutionalized non-veterans.
Community Waivers Allowance	\$692 to \$1054 for a person in community waivers

MEDICARE PART B PREMIUM

Cross Reference: None.

Effective Date: No change.

CARES: No change is required.

ITEM	NEW AMOUNT	OLD AMOUNT
Base Monthly Premium Amount	No Change	\$ 45.50

The Medicare Part B Premium Amount is not changing. The actual amount paid by the person is listed on the BENDEX tape.

If there is Medicare Part B information from the SSA COLA file but no CARES Part B, CARES will be automatically updated, ED/BC will be run and the change will be sent to an information report.

If there is information in the SSA COLA file and in CARES and either amount is zero, CARES will be updated, ED/BC will be run and the change will be sent to an information report.

For each individual where the Medicare Part B Premium Amount or the Medicare Part B Premium Payor is updated, the HIC number on AFMD will also be updated if the COLA file is different than the CARES information. The HIC number will not be updated if CARES has railroad retirement or black lung fund indicated.

SSI-E PAYMENT LEVEL

Cross Reference: MAH, Appendix 19.1.1 & 19.2.2..

Effective Date: No change.

CARES: Not applicable.

ITEM	NEW AMOUNT	OLD AMOUNT
State SSI-E Supplement	Same	\$ 95.99

COMMUNITY WAIVERS BASIC NEEDS ALLOWANCE

Cross Reference: MAH, Appendix 25.9.2.1.

Effective Date: 01-01-00

CARES: This change is part of the 12/04/99 CARES mass change.

ITEM	NEW AMOUNT	OLD AMOUNT
Basic Needs Allowance	\$ 692.00	\$ 680.00
Maximum "Personal Maintenance Allowance"	\$ 1,054.00	\$ 1,037.00

COMMUNITY WAIVERS SPECIAL INCOME LIMIT (GROUP B)

Cross Reference: MAH, Appendix 25.9.2.

Effective Date: 01-01-00.

CARES: This change is part of the 12/04/99 CARES mass change.

ITEM	NEW AMOUNT	OLD AMOUNT
Single person or spouse not applying.	\$ 1,536.00	\$ 1,500.00
Married couple, both applying.	\$ 3,072.00	\$ 3,000.00

AFDC-RELATED INCOME & ASSET CHANGES

Cross Reference: **MAH**, Appendix 30.4.0.

Effective Date: 01-01-00.

CARES: This change is part of the 12/04/99 CARES mass change.

ITEM	NEW AMOUNT	OLD AMOUNT
Income:		
1. Categorically needy.	No Changes.	See MA Hbk.
2. Medically needy.	Size 1 = \$ 591.67	Size 1 = \$ 583.78
Only the limit for medically needy group size 1 changes.		
Assets:		
1. Categorically needy.	No Changes.	See MA Hbk.
2. Medically needy.	No Changes.	See MA Hbk.

SPOUSAL IMPOVERISHMENT BROCHURE

In the past, the spousal impoverishment brochure listed dollar amounts that changed three times each year. Instead of being constantly out of date, we are putting the spousal impoverishment amounts out on the Internet. This should solve the problem of the brochure being obsolete with each dollar amount change.

The new brochure is attached. Workers can access the Spousal Impoverishment Asset and Income Allocation Tables on the Internet at http://www.dhfs.state.wi.us/medicaid/recpubs/spouse_impov.htm.

Click on the link to the tables. Please print them out for anyone who requests a copy and doesn't have Internet access.

CONTACT

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